



Innovative Process Solutions. Bottom-Line Results.

Using SharePoint Workflow to Automate and Improve Business Processes

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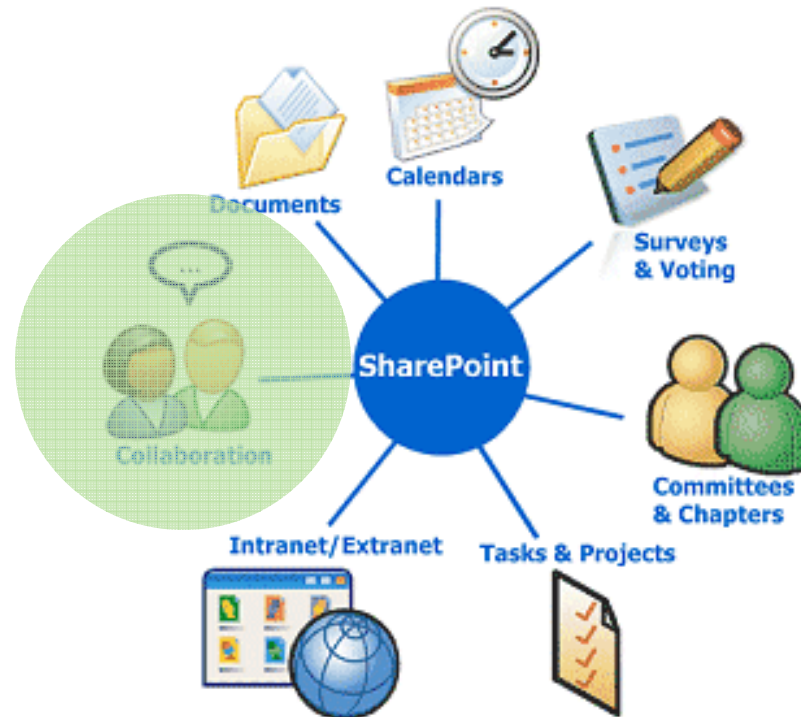
Agenda

- Why workflow in SharePoint
- Workflow options and comparison
- What's new in SharePoint 2010 workflows
- Why 3rd party vendors are needed
- Introduction to ShareVis
- ShareVis case study
- Lunch
- ShareVis Demo
- Q&A and give away



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What is SharePoint?



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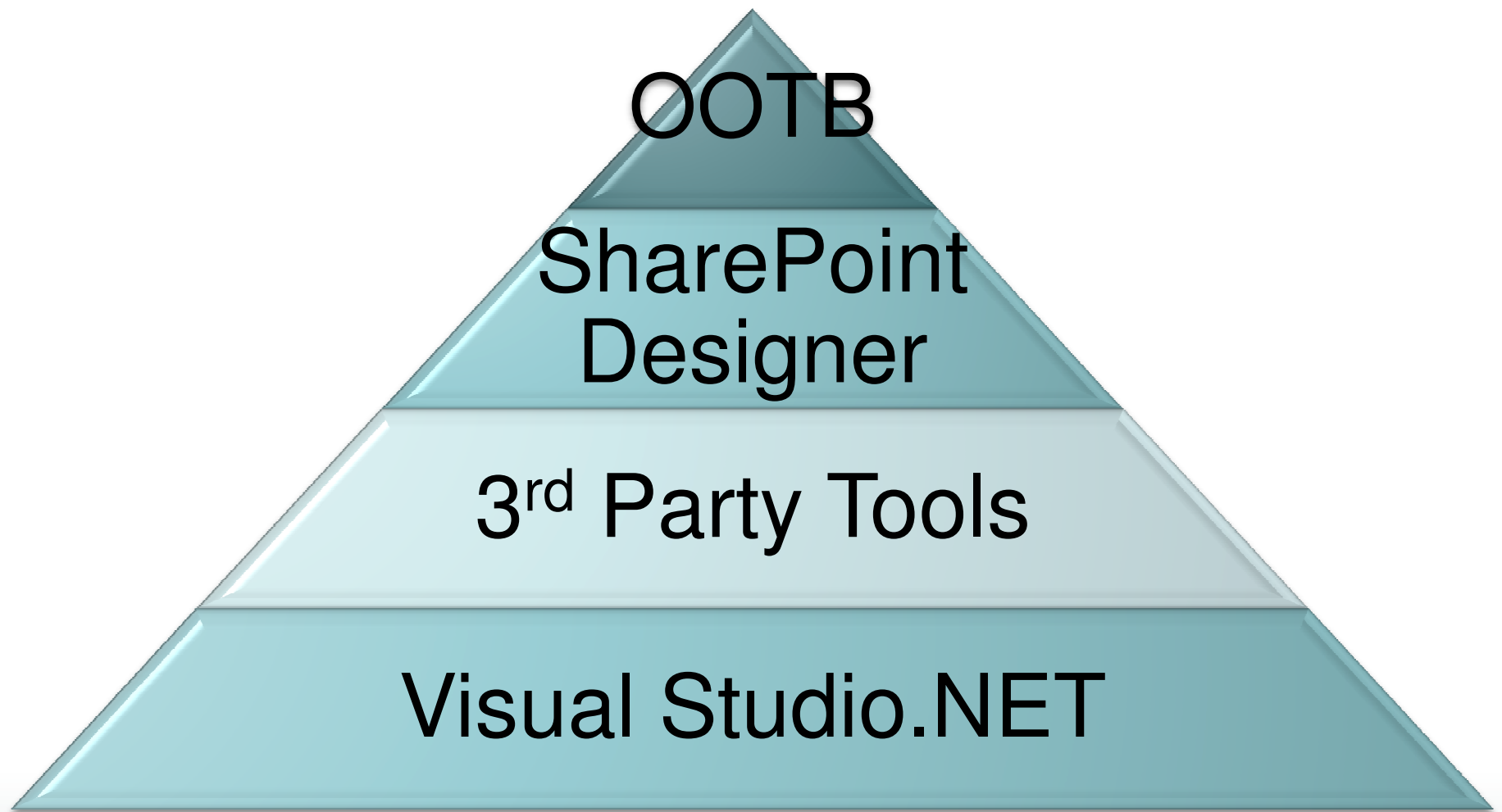
SharePoint Workflow

- How many here are using SharePoint workflow?
- Our experience is that about 5% of those we survey are using SharePoint workflow
- Process automation is one of the biggest bangs for your buck in SharePoint
 - Why are so few using it?



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SharePoint Workflow Options



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Out of the Box Workflows

- Built into MOSS
 - Approval, Collect Feedback, Collect Signatures, and Disposition Approval
 - 3 state workflow in WSS and MOSS

Pros of Out of the Box Workflows

- They are out-of-the-box
 - Just enable them and start using them
- 3 state workflow is somewhat customizable to mimic your business process
- Workflows can automatically start when a document is added/changed or based on IM policies



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Pros of Out of the Box Workflows

- Workflow history can serve as an audit trail

Razorleaf > Shared Documents > Workflow Status
Workflow Status: Approval

Workflow Information

Initiator: Razorleaf Administrator Document: Expense Report
Started: 12/24/2008 8:56 PM Status: Rejected
Last run: 12/24/2008 8:58 PM

Tasks

The following tasks have been assigned to the participants in this workflow. Click a task to edit it. You can also view these tasks in the list Tasks.

Assigned To	Title	Due Date	Status	Outcome
Joe Manager	Please approve Expense Report !NEW		Completed	Rejected by Joe Manager
Sue Accounting	Please approve Expense Report !NEW		Completed	Approved by Sue Accounting

Workflow History

View workflow reports
The following events have occurred in this workflow.

Date Occurred	Event Type	User ID	Description	Outcome
12/24/2008 8:56 PM	Workflow Initiated	Razorleaf Administrator	Approval was started. Participants: Joe Manager, Sue Accounting	
12/24/2008 8:56 PM	Task Created	Razorleaf Administrator	Task created for Joe Manager. Due by: None	
12/24/2008 8:57 PM	Task Completed	Joe Manager	Task assigned to Joe Manager was rejected by Joe Manager. Comments: Some of the meal expenses exceed the per diem.	Rejected by Joe Manager
12/24/2008 8:57 PM	Task Created	Razorleaf Administrator	Task created for Sue Accounting. Due by: None	
12/24/2008 8:58 PM	Task Completed	Sue Accounting	Task assigned to Sue Accounting was approved by Sue Accounting. Comments: Per diem was increased for this trip.	Approved by Sue Accounting
12/24/2008 8:58 PM	Workflow Completed	Razorleaf Administrator	Approval was completed.	Approval on Expense Report has successfully completed. All participants have completed their tasks.



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Cons of Out of the Box Workflows

- Serial or parallel – no option for mixed assignment
- Only dispositions are “approve” and “reject”
 - Workflow can be cancelled when a user rejects or can be allowed to continue
- Workflows are sequential (not state machine)
 - Can't send it back in time



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SharePoint Designer Workflows

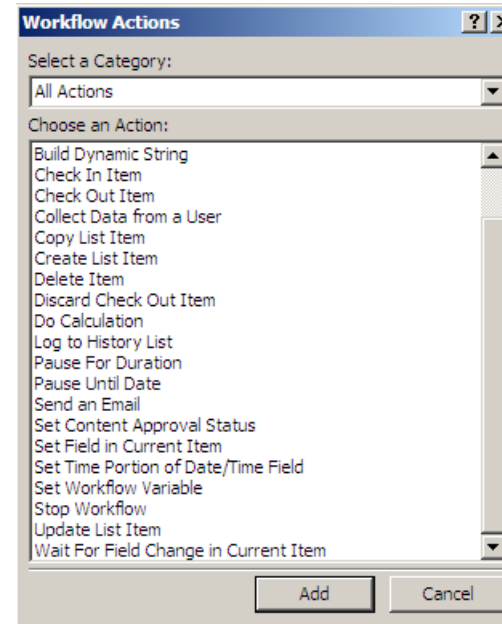
- SPD is Free
- You already have it and use it
- Can create custom workflows
- Somewhat graphical workflow design



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Pros of SPD Workflows

- Logical evaluation
 - User and meta data
- Many built in actions



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Cons of SPD Workflows

- Serial – no option for parallel or mixed assignment
- Workflows cannot be copied from one site to another
- Cannot link InfoPath form views to activities
- Not easy for process owners (non-IT professionals) to create and manage workflows
 - Workflow designers have to use SPD and have all of the SPD tools at their disposal – kinda scary!
- Workflows are sequential (not state machine)
 - Can't send it back in time



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Workflows are BRAND NEW with SP 2010!!

- Oh, Really?
- In reality not much has changed
- A few nice new features
- No game changes



Not so New and Improved

Consider this, at the Microsoft SharePoint Conference in October, 2009 Microsoft showed SharePoint 2010 for the first time and, according to Steve Ballmer's keynote the conference had "almost 250 sessions planned, and over **80% of them will be brand new 2010 content**. That's 15,000 minutes of SharePoint, SharePoint and more SharePoint that you're simply not going to get anywhere else!"

There were **239 sessions** and a whopping 3 on SharePoint workflow (not including a product demo by a 3rd party product vendor).

So that means that when Microsoft was showcasing their \$1 billion business unit, the future of the company, the collaboration platform of choice and the fastest growing product in their history (besides Windows itself) they choose to spend **less than 1.5% of that time on SharePoint workflow**

Makes you wonder how "new and improved" workflow could possibly be in SharePoint 2010!

What is New in SP 2010 Workflow?

- Vast improvements to SPD
 - It feels like it's part of the SharePoint family not just a replacement to Front Page
 - Better workflow design
 - Better for nested logic
- New Activities
- Site Workflows – not bound to a list item
- Reusable workflows
- Customize the OOTB workflows

Visio and SP 2010 Workflow

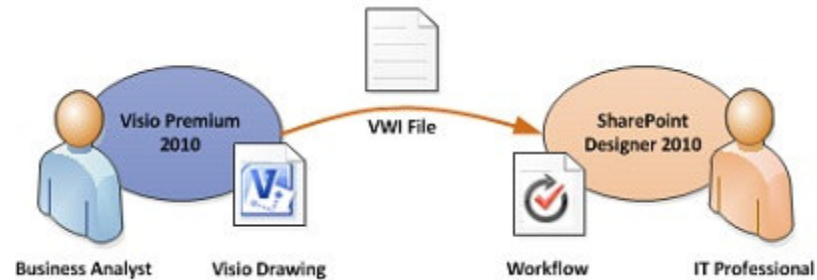
- Visio services for workflow visualization
 - Reports on a single instance of a workflow
 - Not for reporting or aggregation
- Use Visio to start the workflow definition

WRONG!
WOW – Now I can use Visio instead of
SPD use to graphically design my
workflows!!!



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How Visio Works With SPD



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The Need for 3rd Party Tools

- Graphical design
- Involve the business process owners
- Make the design of complex logic easier
- Better Web form capabilities
- Improvements over the sometimes buggy Windows Workflow Foundation



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Who Are The 3rd Parties?



Focus on ShareVis



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Features



- Workflow and forms automation
- Easily connect workflows to InfoPath forms
- Create workflows in flowchart interface
- Complex logical evaluations are easy to create
- Dynamic user assignment
- Plug-ins for common tasks
- Extendable via .NET



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ShareVis Forms

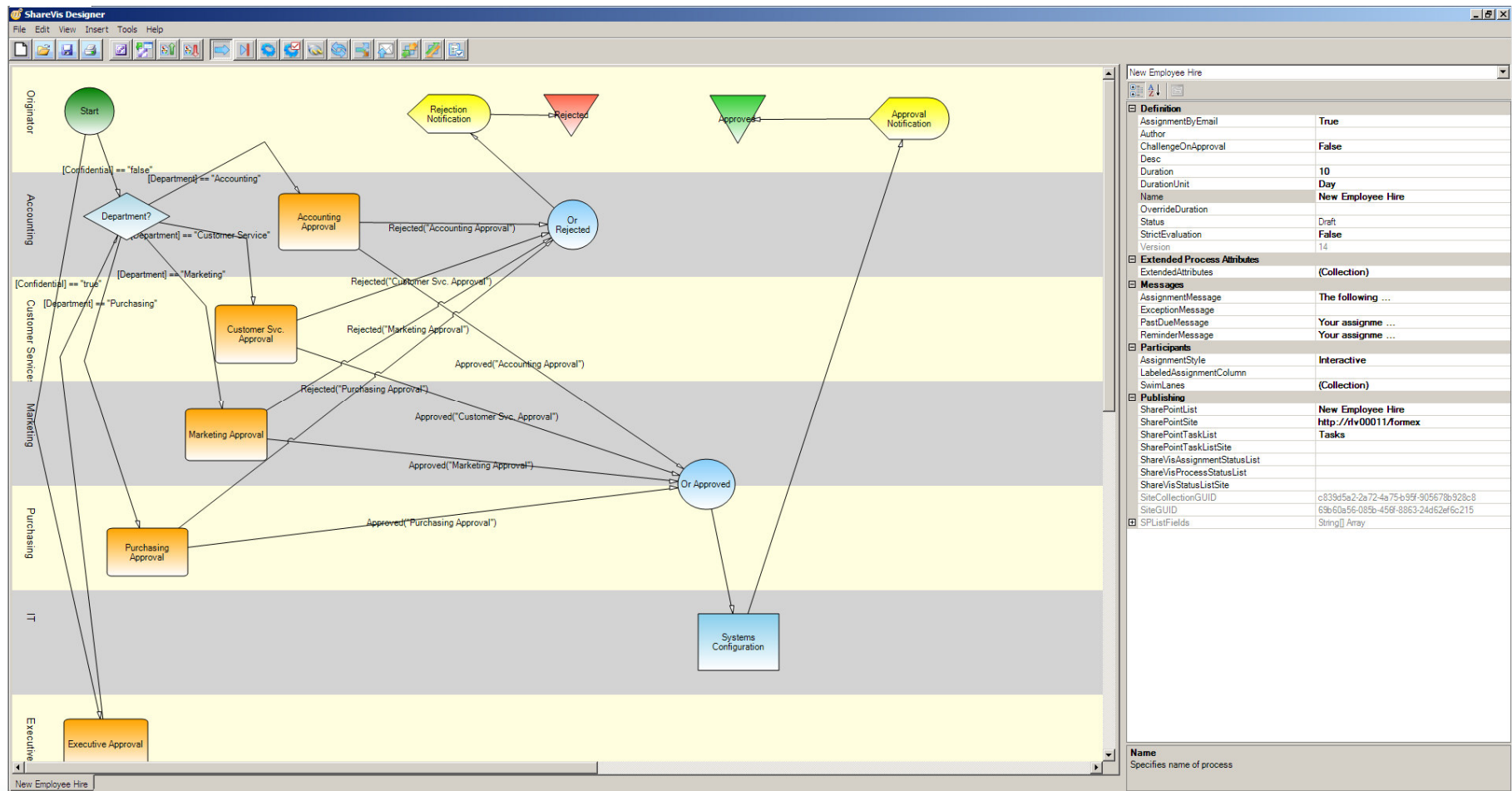


- Created in InfoPath
- Use standard InfoPath functionality
- Enhanced with ShareVis custom controls
 - Form Name, Current User, Form Hierarchy, Form Data Exchange, Controls for dynamic user assignment
 - Use form views to present different views to each workflow participant
- **DOES NOT** require Forms Server or InfoPath client licenses



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ShareVis Workflow Designer



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Process Improvement Example



As previously presented by:

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Kichler Background

- Designs, contract manufactures and distributes residential lighting primarily in the North American market
- 4 locations, Cleveland, East Hartford CT, Atlanta GA, Las Vegas NV
- About 1,000 new orders per day
- About 5,000 active SKUs
- About 400 employees



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Kichler Enterprise Solutions

- ERP Solution – PeopleSoft
 - Supply Chain / Financials / HR
- Warehouse Management
 - Warehouse Advantage (HighJump)
- Product Design and Data Management
 - CAD
 - Artesia (DAM)
- Cisco Call Manager
- Exchange
- SharePoint



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CPI

- 2008 – 2009 was focused on low hanging fruit initiatives
 - Elimination of paper
 - Consolidation of reports
 - Elimination of tedious ERP transactions
 - Focus on data integrity / quality
- 2010 the focus on Workflow
 - White Collar Automation
 - Not typically inside the ERP or Warehouse Management solutions



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ShareVis Evaluation

- Evaluation of ShareVis began in 2009
- CIO and Director of Business Process Improvement budgeted investment for 2010
- Kichler and Adaptive combined training with the Proof-of-Concept workflow (highly recommend this)
- Kichler Selected Credit Memo processing as the Proof-of-Concept
 - 5,000 CM per year
 - Current cycle time is 2 weeks (10 working days)
 - Customer calls about credit memo status were frequent
 - Process involved over 40 people across 2 departments and remote resources (field)



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Credit Memo Pilot

- Pilot included: Customer Service Managers, Customer Service Reps, Credit Managers, Credit Specialist and a Business Analyst and support from Adaptive Corporation
- Form development was 3 weeks and 26 revision (mostly training / learning curve)
- Workflow development was also 3 weeks and 17 revisions (also training / learning curve)
- Form **revisions** and workflow revisions during Pilot were minor, but more importantly **were immediate**



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Results

- Cycle time reduced from 2 weeks to **less than 48 hours**
 - Customer does not have time to call about the status of a Credit Memo as it is already complete
- Process metrics are in the database
- Value-Added steps are significantly reduced
- Non-value added steps will become evident and will be eliminated
- Queue times are significantly reduced



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Metrics

Assignee	Task Name	Assigned Date	Review Date	Completion Date	Status	Comments	
Blair, Sonya	Create Credit Memo	5/21/2010 13:33	5/21/2010 15:09	5/21/2010 15:13	Completed		0:04:33
Feigenbaum, David	Credit Mgr review	5/21/2010 9:48	5/21/2010 13:33	5/21/2010 13:33	Approved		0:00:11
Feigenbaum, David	Credit Mgr review	5/21/2010 9:48		5/21/2010 9:48	ReAssigned	Delegated to Stergiou, Mary	0:00:00
Stergiou, Mary	Credit Mgr review	5/21/2010 9:48	5/21/2010 11:15	5/21/2010 11:16	ReAssigned		0:00:52
Polack, Lisa	CS Team Lead Review	5/21/2010 9:25	5/21/2010 9:48	5/21/2010 9:48	Approved		0:00:24
Blair, Sonya	Start 1	5/21/2010 9:25		5/21/2010 9:25	Completed	FREIGHT AND HANDLING SHOULD NOT HAVE BEEN CHARGED. SHIPPING ERROR. KD/SYB	0:06:00
							3% 5:47:43 0:12:00

Assignee	Task Name	Assigned Date	Review Date	Completion Date	Status	Comments	
Blair, Sonya	Create Credit Memo	5/20/2010 9:34	5/20/2010 9:43	5/20/2010 9:49	Completed		0:06:21
Feigenbaum, David	Credit Mgr review	5/19/2010 14:34	5/20/2010 9:34	5/20/2010 9:34	Approved		0:00:40
Polack, Lisa	CS Team Lead Review	5/19/2010 14:33	5/19/2010 14:33	5/19/2010 14:34	Approved		0:01:18
Polack, Lisa	Start 1	5/19/2010 14:33		5/19/2010 14:33	Completed	10% discount for a project. The order was sent in before Ryan could get a quote.	0:06:00
							1% 19:16:22 0:14:19



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What's Next?

- Users are fully trained and the process is now in production
- Kichler is producing 19 Credit Memos each day
- That is 19 errors!
- Use the database to analyze and group reasons for Credit Memos
 - Perform Pareto Analysis and determine root cause analysis
 - Implement corrective actions
 - Measure that the CA was effective
- The ultimate goal is to do LESS Credit Memos



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What's Next?

- ShareVis will be used by each department to handle 'white collar' processes that are not contained inside our ERP, WMS, or CAD applications including:
 - Request for Quote
 - Invoice Approval for non-inventory Purchase Orders
 - Check Requests
 - International Travel Approval
 - Time Off Requests



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Let's Eat



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Comparison

Feature	OOTB	SPD	ShareVis
Document based workflows	X	X	X
Task assignments available in task list or Outlook	X	X	X
Auto workflow launch on item add or edit	X	X	X
Forms based workflows		X	X
Workflow extensions via programming		X	X
Extend form via JavaScript		X	X
Graphical workflow design environment		X ¹	X
Workflow design by LOB stake holders		X ²	X
Mixed mode, serial and parallel, task assignments			X
Integrated Web form rendering engine			X

¹ SPD has a task based design pallet that is useful for simple, serial workflow design. Complex workflows with conditional routing are a challenge to model with SPD.

² Due to the non-flowchart interface of SPD LOB stake holders will be limited to designing simple workflows only. In SP 2010 the use of Visio for a portion of the workflow design improves this functionality.



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Comparison

Feature	OOTB	SPD	ShareVis
Bulk re-assignment of tasks			X
Email approval			X
Workflow hierarchy (i.e. one workflow kicks off another)			X
Out of office delegation			X
Link specific form views to workflow tasks			X
Add-ons to InfoPath to automate complex tasks			X
Repeat while/until conditions			X
Automatic notification as task approaching being overdue			X
Automatic notification of overdue tasks			X
Automatic re-routing of overdue tasks			X
Reusable custom workflows			X



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Comparison

Feature	OOTB	SPD	ShareVis
Publish completed workflow form with history appended			X
Connect form to any ADO data source without programming			X
Regular Expression form validation control			X
View graphical workflow status via link in browser			X
Fully customizable task assignment emails			X
Flag emails for future delivery			X
Workflow designers DO NOT need full administrative access to SharePoint			X



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